



## Automotive Original Parts and Equipment (OE)

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### SUMMARY

In 2004, U.S. exports of automotive parts to Germany rose by 2% and U.S. manufacturers doubled the number of acquisitions of German automotive original equipment (OE) suppliers compared with 2003. While worldwide exports of German passenger vehicles rose slightly, domestic sales dropped, forcing German automobile manufacturers to offer consumers discounts of more than 10% and to continue demanding cost cuts from parts suppliers. As a result, many parts suppliers merged. While some systems suppliers were able to record sales increases of up to 10%, others are in financial difficulty.

Exports of German automobiles to the United States remained steady in 2004, while sales of U.S.-made light vehicles in Germany fell by 1.2% and sales of light trucks by 2.4%. German automobile manufacturers are producing every fifth automobile sold worldwide and are major potential customers for U.S. automotive parts manufacturers.

Approximately 1,300 automotive suppliers are located in Germany. While research and development activities continue to remain predominantly in-country, 40% of these manufacturers have already moved some production to Eastern Europe. Although the manufacturers and their suppliers created many new manufacturing jobs in Eastern Germany (mainly in Saxony), more than 30,000 jobs are presumably going to be moved to Eastern Europe over the next five years, mainly to such countries as the Czech Republic, Hungary, Poland and Slovenia.

### A. MARKET HIGHLIGHTS AND BEST PROSPECTS

German automobile manufacturers purchase 75 percent of all vehicle parts and manufacture only approximately 25% of the vehicle itself. The following table shows to which extent vehicle parts are manufactured by suppliers, rather than by automobile manufacturers:

**Table 1: Supplier percentage of vehicle**

| Automobile Part            | Supplier % in 2004 | Estimated Supplier % in 2015 |
|----------------------------|--------------------|------------------------------|
| Chassis                    | 77%                | 85%                          |
| Drive Train                | 63%                | 80%                          |
| Motor and associated parts | 50%                | 64%                          |
| Body structure             | 4%                 | 41%                          |
| Body exterior              | 45%                | 71%                          |
| Interior                   | 84%                | 86%                          |
| Electronics                | 84%                | 84%                          |

Parts manufacturers play a crucial role in automotive R&D activities: Most of the inventions in the component sector stem from parts suppliers rather than car manufacturers. U.S. parts manufacturers operating in Germany are typically very strong in electronics, interior parts and assemblies. German companies are concentrating on motor parts, the drive train, chassis and body structure. For suppliers of electronics it should be interesting to note that German car manufacturers are moving to electronic power steering (EPS), away from the traditional hydraulic power steering (HPS). Experts estimate that over the next 10 years the use of EPS in German automobiles will increase by 2.5% per year (compared with 0.4% in the United States).

U.S. companies also have a lead in telematic and infotainment products, such as radio, television, diagnostics, off-board and on-board navigation, intelligent traffic systems or traffic control with multi-function displays integrated into infotainment screen

Micro-sensors and -motors are driving a huge number of applications, such as lighting systems (both interior and exterior), airbags and other safety applications. The increase in use of these systems leads to a growing demand for electronic distribution systems and cables - a typical luxury vehicle needs up to 2,000 meters of cables.

As far as engines are concerned, strict environmental laws governing emission have affected sales of diesel automobiles in the recent past. Alternative energy has always been a major theme for manufacturers and suppliers in Europe. Whereas with an increase in fuel costs Toyota hybrid vehicles have started to sell well in the United States and in other countries, German manufacturers are still undecided on how to proceed: Some are concentrating on "ultra-cap" condensators to store electricity for use within a short time, rather than heavy batteries providing electricity for a longer period, while some believe that the path taken by Toyota should be followed.

All involved parties agree that in order to combat fuel consumption, weight will be further reduced and less steel will be used in the future. Experts believe that aluminum and magnesium will play a larger role, as will plastics and elastomeres. Presently aluminum, magnesium and plastics are used for 15% of parts, but the large German chemical company, BASF, estimates that by 2010, plastics will account for between 20% and 25% of materials used. Porsche, for instance, manufactures the Carrera GT chassis and engine frame out of reinforced carbon fiber. Most plastics parts manufactured in Germany consist of Polypropylen (PP), Polyurethane (PUR) and Polyamid (PA). Also used are Polybutylenterephthalat (PBT) and Acrylnitril-Butadien-Styrol-Copolymere (ABS). Other plastics used are Polyethylenterephthalat (PET), Polyethylen (PE), Polyvinylchlorid (PVC), Polyoxmethylen (POM) and Polyethersulfon (PES).

Whether steel or composite materials are used, the 30% increase in cost of raw materials and oil over the last year has created a major problem for manufacturers and suppliers alike. As the German Automotive Association has pointed out, higher material costs will hit the German automotive industry hard. Especially as this comes at a time when Chinese and other Asian countries are targeting Europe and the United States with inexpensive automobiles.

## -- Statistical Data

**Table I: The German Market for Automotive Original Equipment (OE), Parts and Components /USD million)**

|                          | 2002   | 2003   | 2004   | Est. Growth<br>%<br>2005 –<br>2007 |
|--------------------------|--------|--------|--------|------------------------------------|
| Import Market            | 11,817 | 12,473 | 13,129 | 0-5                                |
| Local Production         | 41,608 | 42,024 | 42,864 |                                    |
| Exports                  | 16,660 | 16,826 | 17,667 |                                    |
| Total Market             | 36,765 | 37,671 | 38,326 | 0-5                                |
| U.S. Imports             | 630    | 640    | 656    | 0-5                                |
| Inflation Rate (assumed) | 1.0    | 1.5    | 2.0    |                                    |

(Please note: All calculations are based on EUR)

### 2005 Import Market Share

(Percent for U.S. and Major Competitors):

U.S.: 5%; Czech Republic 5%; Japan 5%; Poland 5%; Belgium: 6%; Hungary 7%; Austria 8%; Italy: 8%; Spain 8%; %; UK: 8%; France: 15%; other: 20%

### Receptivity Score (1/low - 5/high): 3

Please note that Intra-European trade is no longer considered international and it is difficult to obtain reliable export/import statistics. Many U.S. systems suppliers and component manufacturers are based in neighboring EU countries and, therefore, export/import figures in this report must be considered provisional.

## B. COMPETITIVE ANALYSIS

At the end of the eighties, over 25,000 automotive components manufacturers existed worldwide. The number of active firms has been reduced to between 5,000 and 6,000 and is expected to decrease to between 3,000 and 4,000 over the next ten years - the consolidation leading to an increase of "mega" systems suppliers (companies with more than USD 10 billion sales). Over the last 10 years, the number of "mega" suppliers grew from originally three to ten. But even these large suppliers have been under constant financial pressure.

In Germany, slightly more than 1,300 parts manufacturers supply to these "mega" companies. Since reunification, financial incentives have been offered to manufacturers willing to invest in eastern Germany. The State of Saxony has been especially successful in attracting automobile manufacturers such as BMW, Porsche and Volkswagen, followed by their suppliers locating in "factory" parks alongside the manufacturing plant. The Commercial Service (CS) organizes a U.S. pavilion at the automotive sub-contractors show held in Leipzig (Saxony) each year in June and offers support to U.S. companies interested in the German market.

U.S. manufacturers (or U.S.-owned suppliers) dominate the German market, in most cases with manufacturing facilities in Germany, they are:

Arvinmeritor  
American Axle  
Borg Warner Automotive GmbH

Bridgestone Deutschland GmbH  
Dana Corp.  
Delphi Deutschland GmbH  
Eaton Automotive GmbH  
Goodyear GmbH & Co. KG  
Johnson Controls – Borg Instruments AG  
Magna  
Tenneco Automotive Deutschland GmbH  
TRW Automotive GmbH  
Visteon Deutschland GmbH

Major German suppliers are:

Behr GmbH & Co. KG  
Benteler AG  
Robert Bosch GmbH  
Continental Teves AG & Co. oHG  
Elringklinger AG  
J. Eberspaecher GmbH & Co. KG  
Edscha AG  
Hella KgaA Hueck & Co.  
Invensys Messner GmbH  
Mahle GmbH  
Michelin Reifenwerke KGaA  
Siemens VDO Automotive AG  
ZF Friedrichshafen AG  
Valeo GmbH  
Webasto AG

In the electronic sector both German and U.S. manufacturers are expected to increase turnover by seven percent or more in the near future.

German automobile manufacturers have continued to set up automobile manufacturing facilities in countries where their customers are based and experts believe that 50% of “German” vehicles will be manufactured outside Germany in the near future. As systems suppliers are expected to follow car manufacturers, the trend will be for suppliers to invest increasingly in foreign operations.

### **C. END-USER ANALYSIS**

The market can be divided into two categories - the first being sales of Original Equipment (OE) to automobile manufacturers or their parts (systems) suppliers, the second is the sales of parts and equipment for the aftermarket, to automotive workshops, wholesalers and retailers. OE automobile manufacturers in Germany are:

- I. VOLKSWAGEN AKTIENGESELLSCHAFT  
Postfach  
38436 Wolfsburg  
Telephone (05361) 90\*  
Telefax (05361) 928282  
Internet [www.volkswagen.de](http://www.volkswagen.de)
- II. SKODA - Czech Republic  
contact thru Wolfsburg: see above  
Internet [www.skoda-auto.com](http://www.skoda-auto.com)

- III. SEAT - Spain - thru Wolfsburg above  
Internet [www.seat.de](http://www.seat.de)
- IV. AUDI AG  
Auto-Union-Strasse  
85057 Ingolstadt  
Telephone (0841) 890\*  
Telefax (0841) 894083  
Internet [www.Audi.de](http://www.Audi.de)
- V. BAYERISCHE MOTORENWERKE - BMW AG  
BMW Haus  
CEO - Prof. Joachim Mielberg  
Knorr Strasse 147  
80788 Muenchen  
Telephone (089) 3820\*  
Telefax (089) 38244558  
Internet [www.bmw.de](http://www.bmw.de)
- VI. FORD-WERKE AKTIENGESELLSCHAFT  
Henry-Ford-Strasse 1  
50735 Cologne  
Telephone (0221) 900\*  
Telefax (0221) 9012254  
Internet [www.Ford.de](http://www.Ford.de)
- VII. ADAM OPEL AG – General Motors European Operations  
GENERAL MOTORS  
Postfach 1710  
65423 Ruesselsheim  
Telephone (06142) 770  
Telefax (06142) 664859  
Internet [www.opel.de](http://www.opel.de)  
Internet [www.gmsupplypower.com](http://www.gmsupplypower.com)
- VIII. GENERAL MOTORS  
CONTINENTAL PURCHASING  
Telephone: 06142-77-2500
- IX. DAIMLER-BENZ AKTIENGESELLSCHAFT  
Postfach 60020  
70322 Stuttgart 60  
Telephone (0711) 170\*  
Telefax (0711) 22244  
E-mail [dialog@daimlerChrysler.com](mailto:dialog@daimlerChrysler.com)  
Internet [www.media.daimlerchrysler.com](http://www.media.daimlerchrysler.com)
- X. PORSCHE AKTIENGESELLSCHAFT  
Dr. Ing. h.c. F. Porsche AG -  
Porsche Str. 42  
70435 Stuttgart-Zuffenhausen  
Telephone (0711) 911-0  
Telefax (0711) 827-5179  
Internet [www.Porsche.com](http://www.Porsche.com)

## **-- German automotive parts and systems purchasing departments**

Because of language barriers and the complex organization of purchasing departments, it is sometimes difficult for foreign companies to approach purchasers at the major German automobile manufacturing companies.

Specified contact information and organizational charts of the purchasing departments of the major automobile manufacturers, wholesalers, distributors and OEM agents are available from CS Frankfurt.

U.S. OEM parts manufacturers can also approach the major systems suppliers in Germany, as noted in section B, above.

To sell to German OE manufacturers and suppliers, U.S. manufacturers are well advised to also approach German OEM agents or agencies that specialize in dealing with German OE manufacturers and their domestic suppliers. These entities tend to consist of ex-purchasing department executives that earlier worked for European automobile or OEM parts manufacturers. Most agency executives, unlike those in the U.S., have an engineering background and in addition are multi-lingual. In dealing with U.S. manufacturers, some German automobile manufacturers and parts and system suppliers prefer to work through German OEM agents, especially those that have their own R&D departments and have staff willing to travel to the U.S. at short notice. Some agencies operate globally. CS Frankfurt is in constant contact with such agencies.

## **D. MARKET ACCESS**

There are basically three ways for successful penetration of the German OE market: Directly approaching OE automobile manufacturers or suppliers, appointing a representative (OE agency), or exhibiting at one of Germany's excellent automotive industry trade fairs (for further information on trade fairs see below).

In order to ease access to the German market, the Commercial Service in Frankfurt has signed "Memorandums of Understanding - MOU" with four major U.S. automotive associations representing both OE and aftermarket products - with the AAIA, APRA, MEMA and SEMA. Through the MOU agreements, members of these associations have a venue to approach German end-users, or can use CS services and personnel at selected German Trade Fairs. Detailed information can be obtained from CS Frankfurt (for contact information, please see the end of this report).

## **--E - Commerce**

German automobile manufacturers and systems suppliers have been quick to embrace E-Commerce applications. The Commercial Service (see end of report for contact details) has details on the appropriate portals to use, as well as lists of individuals in the internal purchasing offices with these companies, on file

E-Commerce platforms are designed to not only to speed up the purchasing of OEM parts, but also to shorten the time between the customer ordering a new vehicle and its ultimate delivery. This is enabled through a direct link between the dealership (point of automobile purchase and selection of extras/OE equipment) and the OEM parts supplier/OEM automobile manufacturer. In other words, the OEM parts supplier will be directly informed of the type of vehicle and extras needed, rather than the order going from the dealership to the automobile manufacturer and then having the automobile manufacturer inform the parts supplier on the parts needed.

U.S. companies can contact CS Frankfurt for details and names of E-Commerce

platforms that are run by OE manufacturers and suppliers in Germany.

### **--Business Standards**

Following is an informal translation of the German Automobile Association's guide for German OEM producers. This guide provides an excellent description of the business standards in the German automotive industry.

(Begin informal translation)

Any agreement between automobile manufacturers and suppliers should be cooperative and trustful, and should present rights and duties for both sides. Both parties should share responsibilities, opportunities and risks. Manufacturers should inform suppliers about their strategies and targets as early as possible in order that the suppliers can structure their research accordingly. Price analysis for both sides should be taken into account. Both parties should agree on realistic price increases for modifications, specifications or any other additional services, and should cooperate in trying to reduce costs. Mutual investments should be considered for expensive projects. Settlement of accounts should be made as soon as possible after a project has been finished. Long-term or lifetime contracts can be made, with clauses for exceptional cost changes, as long as all details are finalized before the contract is signed. Projects and construction plans must be kept secret. CAD-data and product and technical details must not be passed to other users. An agreement by both parties is necessary for any exceptions. Automobile manufacturers must respect trademarks of suppliers. Quality standards (Q-target, Q-instruments) should be agreed on. Control analysis and warranties should be considered.

(End translation)

### **-- Customs Duties**

Customs duties for automotive parts and accessories average approximately five percent. No customs duties are levied on imports from European Union (EU) countries. An import turnover tax of 16% is currently applied, which in turn is passed on to the final customer as a value-added tax (VAT). VAT also applies equally to European and German suppliers. Trade restrictions or other non-tariff barriers (such as quotas) do not exist, but all equipment has to comply with German (and/or European) safety regulations and technical standards. The metric system of weights and measures is standard in Germany.

### **-- TECHNICAL STANDARDS**

Technical standards are defined, maintained and approved by:

DIN Deutsches Institut fuer Normung e.V.

(German Institute for Standards)

Burggrafenstr. 6

10787 Berlin

Telephone: (030) 2601-0

Telefax: (030) 2601231

English translations of standards are available from Beuth Verlag GmbH (Beuth Publishing), at the same address.

U.S. Manufacturers can contact CS Frankfurt for a list of companies/agencies that certify products to the following standards:

ISO/TS 16949  
QS. 9000  
VDA 6.x

For further information on trade regulations and standards, please see the Country Commercial Guide for Germany, at [www.buyusa.com/de/en](http://www.buyusa.com/de/en).

## **-- Industry Associations**

Verband der Automobil Industrie e.V. (VDA)  
(German Automobile Association)  
Westendstrasse 61  
60325 Frankfurt am Main  
Telephone:(069) 975070  
Telefax:(069) 7570261  
Internet: [www.vda.de](http://www.vda.de)

## **Trade Promotion Opportunities**

### **-- Trade Publications**

Advertising in professional trade journals is a well-accepted method of product promotion. The following German language magazines are important for U.S. exporters of OE parts and systems:

MTZ - Motortechnische Zeitschrift  
ATZ - Automobiltechnische Zeitschrift  
Franckh'sche Verlagshandlung  
W. Keller & Co.  
Pfizer Strasse 5 - 7  
70184 Stuttgart  
Telephone: (0711) 21910  
Telefax: (0711) 2191360  
Frequency of Publications: monthly  
Circulation: 3,500 (each)

The above magazine is published in English and German, and deal with technical engineering information used in the production of engines and chassis.

Automobil Produktion Verlag  
Moderne Industrie AG  
Justus-von-Liebig-Strasse 1  
86899 Landsberg  
Telephone: (08191) 1250  
Telefax: (08191) 125279  
Internet: [www.automagazine.de](http://www.automagazine.de)  
Frequency of Publication : quarterly  
Circulation: 8,000  
German language publication dealing with all aspects of automobile production.

Lastauto - Omnibus  
Vereinigte-Motor-Verlage GmbH & Co KG  
Schloss Strasse 37  
70174 Stuttgart 1



Telephone: (0711) 784980 /11  
Telefax: (0711) 7849889  
Internet: [www.eurotransport.de](http://www.eurotransport.de)  
Frequency of Publication: monthly  
Circulation: 14,000  
German language publication dealing with bus and truck production.

Fahrzeug & Karosserie  
Gentner Verlag Stuttgart  
Forst Strasse 131  
70193 Stuttgart  
Telephone: (0711) 636720  
Telefax: (0711) 6367247  
Internet: [www.shk.de](http://www.shk.de)  
Frequency of Publication: monthly  
Circulation: 6,500  
German language publication for bodyshop equipment.

Autohaus  
Bartsch Verlag  
Alte Landstr. 8 - 10  
85521 Ottobrunn  
Telephone: (089) 43721110  
Telefax: (089) 43180372  
Internet : [www.autohaus.de](http://www.autohaus.de)  
Frequency of Publication: bi-weekly  
Circulation: 20,500  
German language publication for producers, suppliers and users of bodyshop and auto maintenance equipment.

Krafthand  
Krafthand Verlag  
Postfach 1462  
86825 Bad Woerishofen  
Telephone: (08247) 30070  
Telefax: (08247) 300770  
Internet: [www.krafthand.de](http://www.krafthand.de)

KFT  
Heinrich Bauer Spezialzeitschriften  
Hardenberstr. 28  
10623 Berlin  
Telephone: (030) 8835100  
Telefax: (030) 8818915  
Frequency of Publication: monthly  
Circulation: 110,000  
Technical magazine reporting on engines and related components, also incorporates a technical dictionary.

-- Trade Fairs

Participation by U.S. companies in German trade shows is one of the best means of finding customers in Germany and throughout Europe. U.S. manufacturers not yet represented in the European market, or those who wish to present new products, should consider exhibiting at international German trade fairs. Details of U.S. pavilions at these trade fairs can be obtained from CS Frankfurt. Relevant fairs are listed below:

**Event: AUTOMECHANIKA - Frankfurt**

Site: Frankfurt

Dates: September 12-17, 2006

Organizer: Messe Frankfurt - Messe und Ausstellungs GmbH  
(Exhibition Frankfurt - Fair and Exhibition Organizer)

Contact: Mr. Skander Negasi (Project Manager)

Ludwig-Erhard-Anlage 1

60327 Frankfurt

Telephone: (069) 7575-0      Extension 6711 -

Telefax: (069) 75756433

Internet: [www.messe-frankfurt/-automechanika](http://www.messe-frankfurt/-automechanika)

E-mail: [info@messefrankfurt.de](mailto:info@messefrankfurt.de)

or, contact in the United States

Messe Frankfurt, Inc.

Dirk Heinz Ebener

200 Galleria Parkway, NW

Atlanta, Georgia 30339

Telephone: (770) 984-8016

Telefax: (770) 984-8023

E-mail: [dirk.ebener@usa.messefrankfurt.com](mailto:dirk.ebener@usa.messefrankfurt.com)

In 2004, AUTOMECHANIKA featured 4,468 exhibitors, including over 200 from the United States, on 300,000 square meters of exhibition area and attracted 163,564 trade visitors from 145 countries. This trade fair is the world's largest for automotive parts and equipment, workshop equipment and services, and, since 2002, also showcases OE parts and systems. Automechanika is held every two years, alternating with the. Most visitors are buyers from international wholesalers and distributors.

In cooperation with major U.S. associations, CS Frankfurt provides pre-show support and product promotion for U.S. manufacturers to the European press, as well as staff hands-on support at five major U.S. pavilions. In 2004, U.S. manufacturers sold after-market products off the floor for over USD 50 million, with additional sales of over USD 80 million expected over the following 12 months.

**Event: Z - Die Zuliefermesse (The Subcontracting Fair)**

Site: Leipzig

Dates: June 20-22, 2006

Organizer: Leipziger Messe

Dr. rer.nat. Deliane Traeber - Project Manager

Postfach 100720

04007 Leipzig

Telephone: (0341) 678-0      Extension 8297

Telefax (0341) 6788762

E-mail: [info@leipziger-messe.de](mailto:info@leipziger-messe.de)

Internet: [www.zuliefermesse.de](http://www.zuliefermesse.de)

CS Frankfurt recruits and organizes a U.S. pavilion at this fair. For further information please contact CS Frankfurt (contact information follows at the end of this report).

The fair is for tier one and two automotive parts manufacturers and systems suppliers. It also features automotive machine tool manufacturers. This fair is definitely not for aftermarket products or accessories. CS Frankfurt highly recommends this fair to U.S. manufacturers wishing to enter the German OE market.

In 2004, The "ZulieferMesse and Mechatronix (Z)" featured 462 exhibitors from 24 countries, over an area of 14,000 square meters. It attracted 4,519 industry visitors, of which over 20% were from outside Germany. "Z" is for the automotive supplier and machine tool sector and is very specific, showcasing original automotive parts, equipment and systems (OE products only). Part of the fair is dedicated to the automotive machine tool sector.

**Event: Testing + Engine Expo**

Site: Stuttgart

Dates: May 9-11, 2006

Organizer: UK IP Media and events

Abinger House

Church Street, Dorking, Surrey RH 4 1DF

United Kingdom

Telephone: (01306) 743744approx.

Telefax: (01306) 887546

E-mail: [j.challen@ukintpress.com](mailto:j.challen@ukintpress.com)

Internet: [www.engine-expo.com](http://www.engine-expo.com)

At this very specialized niche event in 2005, more than 350 exhibitors displayed products. This event features two separate sections; engine and testing equipment. In 2005, the event covered a total exhibition area of 18,000 square meters. Over 10,463 businessmen attended the fair, a high percentage of them from foreign countries.

CS Frankfurt promotes U.S. participation at this show and a U.S. pavilion will be organized for 2006.

**Event: IAA (International Automobile Exhibition)**

Site: Frankfurt

Dates: September 17-25, 2005

Organizer: Verband der Automobil Industrie e.V.  
(Automotive Industry Association)

Westend Strasse 61

60325 Frankfurt am Main

Telephone: (069) 975070

Telefax: (069) 97507305

Internet: [www.vda.de](http://www.vda.de) or [www.iaa.de](http://www.iaa.de)

or, contact in the United States:

Motor Vehicle Manufacturers Association

Att. Mr. Evers

300 New Center Bldg.

Detroit, MI 48202

Telephone: (313) 872-4311

Telefax: (313) 872-5400

In 2003, a total of 988 exhibitors from 42 countries displayed their products in ten halls covering a total exhibition area of 155,475 square meters. Over 996,000 people visited the fair, a high percentage of them from foreign countries. A total of 37% of the exhibitors were foreign, with 13% from the United States (U.S. companies located in Germany not included). Interestingly, 33% of the visitors are from the automotive industry, although the consumer and world press attention is on new passenger vehicles.

The consumers visit the ground floors of all of the major halls, where the IAA showcases

new passenger vehicles (57 new car premiers in 2001) as well as tuned and customized vehicles.

Twenty-six percent of the visitors represent automobile manufacturers and 28% parts and equipment manufacturers. According to the VDA, 25% of the industry visitors are decision makers. The show is ideal for U.S. manufacturers that are promoting/launching a new product, especially those wishing to have visibility with consumers.

**Event:IAA NUTZFAHRZEUGE - Heavy duty vehicle exhibition**

Site:Hanover

Dates: September 21-28, 2006

Organizer: Verband der Automobil Industrie e.V.  
(Automotive Industry Association)

Westend Strasse 61

60325 Frankfurt am Main

Telephone (069) 97507 0

Telefax (069) 97507305

Internet:[www.vda.de](http://www.vda.de)

or, contact in the United States:

Motor Vehicle Manufacturers Association

Att. Mr. Evers

300 New Center Bldg.

Detroit, MI 48202

Telephone: (313) 872-4311

Telefax: (313) 872-5400

In 2004, a total of 1,370 exhibitors from 38 countries displayed their products at the Hanover fairgrounds, using a total exhibition area of 167,152 square meters. 746 exhibitors were from the parts (OE and aftermarket) and equipment sector. Over 40% of the exhibitors were from outside Germany. A total of 254,300 people attended the fair (20% from outside Germany), of which 232,900 were business visitors. According to the VDA, over 30% of business visitors were decision makers.

At this fair, manufacturers exhibit trucks, buses, trailers and truck bodies, as well as all possible aspects of accessories and transport devices. In addition, exhibitors include logistics and transport companies dealing with freight by land and rail.

For More Information

Commercial Service Contact:

Paul R. Warren-Smith

American Consulate General

U.S. Commercial Service

Telephone: (069) 95620415

Telefax (069) 561114

E-mail:Paul.Warren-Smith@mail.doc.gov

The U.S. Commercial Service Germany can be contacted via e-mail at: [frankfurt.office.box@mail.doc.gov](mailto:frankfurt.office.box@mail.doc.gov), website: <http://www.buyusa.gov/germany/en/>.

You can locate your nearest U.S. Export Assistance Center, as well as Commercial Service offices overseas by visiting [www.buyusa.gov](http://www.buyusa.gov).

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